

FOUNDATION FOR THE CAROLINAS

Title: Onboarding Specialist

Division/Department: Customer Experience & Applicant Experience

Reporting To (title): Vice President & Director, Customer Experience and Applicant Experience

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Temporary/Contract

POSITION SUMMARY

E4E Relief, the nation's leading provider of employee disaster and hardship relief funds, and subsidiary of the Foundation for the Carolinas are seeking qualified candidates to join our team as a Onboarding Specialist. For over 20 years, E4E Relief has been the leading provider of unique, charitable business solutions to respond to crisis and hardships quickly and efficiently. We empower companies and employees to respond to crisis by providing a global, charitable solution in times of catastrophic and unexpected need. Our hope is that the solution provides a heartfelt response to a stronger connection between a company and employees affected by crisis.

The Onboarding Specialist will serve as an integral member of our Customer Experience Team. Partnering with new clients and their dedicated Relationship Manager (RM) to coordinate and facilitate the onboarding process. The RM and Onboarding Specialist will partner to ensure a successful onboarding (launch) for new clients as they design, implement, and launch their Employee Relief Fund program with E4E Relief. During this critical and important early phase of the customer lifecycle, the Onboarding Specialist provides the solid foundation that drives customers' future successes for program and platform understanding. Following a successful launch, they will support a smooth transition to the client RM who will be the primary point of contact for the relationship going forward. The Onboarding Specialist will also play a key role in defining processes and ensuring the transition from sales to onboarding to relationship management is seamless and that there are meaningful interactions along the way to continue to build the relationship with the new client.

DUTIES & RESPONSIBILITIES

- Act as an extension of the sales team to onboard new clients
- Support any additions or program expansions for existing clients
- Establish expectations regarding the onboarding/expansion processes and timelines
- Track and communicate onboarding activities, both new and expanding programs, across all internal teams to ensure readiness and capacity
- Partner with the technology and operations teams to set-up the new client portal, application, and support functions aligned with new program's eligibility requirements and scoped services as identified through the sales/contracting process or to make the appropriate changes for program expansions
- Ensure proper set up for launch regarding the technology needs for the platform based on the volume and number of projected users. Work with the technology team to ensure appropriate server assignments prior to setting up portal
- Partner with new clients to ensure they continue to build an understanding of the platform and program requirements
- Seek feedback from customers to ensure E4E Relief is meeting their needs during the launch experience

- Demonstrate the technical accessibility and ease of use of the platform to both highly technical and non-technical audiences
- Provide technical support including troubleshooting issues and providing resolution to customer issues that might arise during launch, engaging our support and technology teams, if necessary
- Listen to and understand the customer's needs and provide proactive suggestions as well as answers to improve customers' use and satisfaction
- Continuously analyze launch processes, procedures, customer feedback and tools to develop enhancements to be implemented in future launches. Use feedback from training sessions to help drive enhancements to our product
- Conduct post-launch activities including surveying new clients and providing appropriate summaries to both internal and external constituents
- Work with the relationship managers to facilitate a seamless transfer once the program is active

JOB QUALIFICATIONS

- Bachelor's Degree required
- 3-5 years of experience in a related role
- Strong communication and follow-up/follow through skills
- Strong attention to detail
- Technical know-how/savviness
- Process and customer service orientation
- Self-starter
- Highly organized and strong attention to detail
- Excellent written and verbal communication abilities
- Ability to prioritize and manage multiple responsibilities
- Teamwork orientation with ability to effectively work across several teams to achieve goals
- Creates excitement and a strong sense of urgency when working with a high volume of new clients
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended period
- Occasionally moving about to accomplish tasks or moving from one worksite and/or workstation to another

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the position. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

POSITION SPECIFIC COMPETENCIES

Select from the following position-specific competencies. Please limit the total number of competencies to 10 or less.

All Employees: Communication & Interpersonal Skills

Executive Team: Leadership Strategic Thinking Fiscal Stewardship

All Supervisors: Delegating Responsibility & Empowering Employees Managing Employee Performance Ensures Consistent Policies & Practices

General:

Affiliate Management Budgeting & Cost Awareness Building Organizational Commitment

Building Team Environment Client Records Concern for Employee

Customer Skills

Entrepreneurial Orientation

Implementing New Technologies

Job Skills

Meeting Targets

Productivity

Relationship Building/Networking

Time Management

Dependability

Equipment Skills

Initiative

Managing Meetings

Presentation Skills

Project Management

Results Oriented

Training & Development

Satisfaction

Ensures Proper Training in New Technologies

Fund Management

Innovative Thinking

Managing Multiple Priorities

Product Knowledge

Quality of Work

Technical Skills

Writing Skills